
Interim report on improving reusability and interoperability of OER and training
educators to develop OER.

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Narrative report

This interim report documents the activities for grant from the William and Flora Hewlett Foundation to the Open Education Resource Foundation (Ltd) for the period 1 August 2009 till 31 July 2010. The grant is directed at three major outcomes:

1. Improving content interoperability and pedagogical reusability of OER
2. Building OER capacity through the Learning4Content workshops
3. Establishing a national OER collaboration for the New Zealand school sector.



The OER Foundation provides leadership, international networking and support for educators and educational institutions to achieve **their** objectives through open education. The strategic objective of the OER Foundation is to nurture the development of sustainable and scalable OER ecosystems, and in this regard is a unique institution with reference to designing a sustainable model from inception rather than converting from a the baseline of large grants from external donor agencies.

During the first year of operation, the OER Foundation has:

- successfully completed the open and transparent development of its strategic and operational plans¹,
- managed the migration of a top 100K website from the web server administered by Commonwealth of Learning,
- commenced development work to improve interoperability of open content between repositories and delivery technologies and continues to provide free training through the Learning4Content project, an
- worked with the New Zealand Ministry of Education and schools to establish a national OER commons for the school sector.
- developed and implemented the online infrastructure to administer the international recruitment of contributing members and public gifting campaigns,
- developed and approved the privacy policy documentation for contributing members and donors,
- recently commenced with the international recruitment of contributing members. To date, Athabasca University (Canada), BCcampus (Canada), Empire State College, (State University of New York, USA), the National University of Samoa, MSUGlobal (Michigan State University, USA), Massey University (New Zealand) and Otago Polytechnic (New Zealand) have signed up as founding members,

WikiEducator is a flagship initiative of the OER Foundation and continues to report positive growth. On 1 July 2009 WikiEducator became an independent project led by the OER Foundation. Consequently, the review period covered a material uncertainty with reference to the shift in custodianship from an international intergovernmental agency to a new non-profit entity. As a new foundation, this change in organisational leadership could potentially have curtailed growth and performance of the WikEducator project. However, growth and productivity metrics confirm that WikiEducator has exceeded its predicted output targets under the auspices of the OER Foundation.



¹ <http://wikieducator.org/OERF:Planning>

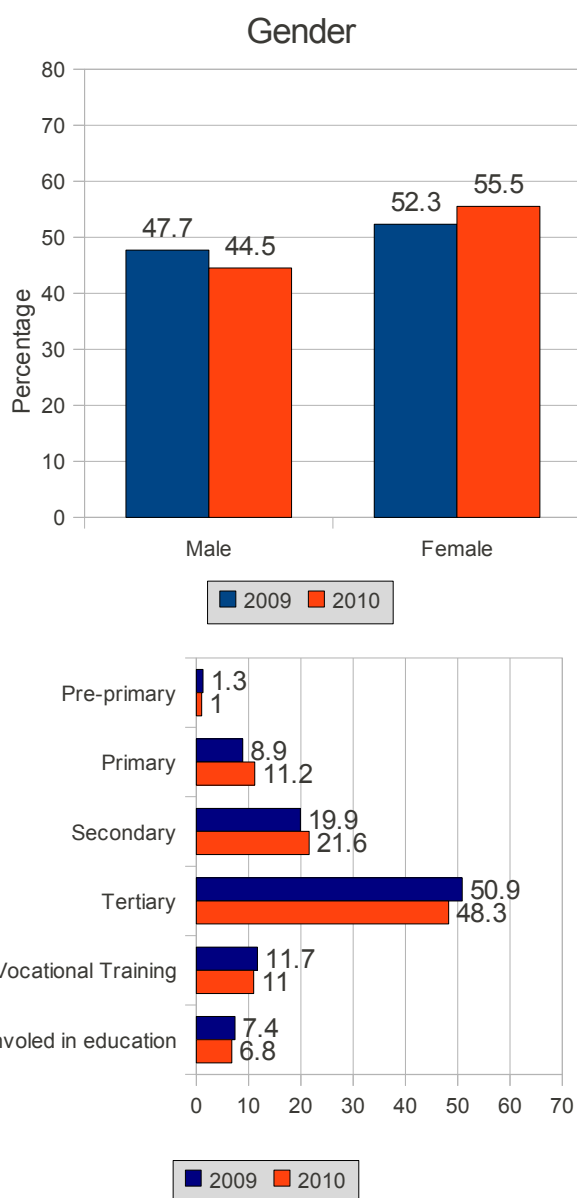
Drawing on historical data while operating under the Commonwealth of Learning, we estimated that the project would achieve 13,842 registered WikiEducator users by 31 July 2010. On this date, the OER Foundation recorded 15,466 registered users thus exceeding our specified target by 12%. As of 26 August 2010, WikiEducator has 15,559 registered users suggesting that the project is well on track to exceed the projected target of 17,000 users by 31 July 2011.

Two demographic trends during the current reporting period require specific mention. First, there is a positive increase in the female gender ratio in the WikiEducator community. 55.5% of WikiEducator users are female, which is noticeably better when compared to Wikipedia where only 13% of editors contributing to articles are female. (In terms of readership of Wikipedia 69% are male, compared with 31% female.) It would appear that our gender demographic reflects the profile of educators in the sector with 74.5% of users being teachers, lecturers or trainers working in the formal sector. Second, there is an increase in the percentage of WikiEducator users from the school sector from 30.1% to 33.8 % confirming that our efforts to increase engagement from schools is delivering positive results.

Under the stewardship of the OER Foundation, WikiEducator has exceeded its estimated training targets. Today, WikiEducator is one of the world's most productive OER communities serving the formal education sector. This is evidenced by recently attaining more cumulative edits and legitimate content pages when compared to the Wikiversity project administered by the Wikimedia Foundation. WikiEducator has recorded 620,017 edits and 14,768 legitimate content pages compared with 604,771 edits and 12,880 content pages in Wikiversity (26 August 2010,)

The OER foundation works across the school and postsecondary education sectors capitalising on the efficiencies of a shared technology infrastructure. It is one of only a few mainstream OER projects in the formal education sector founded on model of collaborative effort rather than a traditional publishing model. The OER Foundation is surprisingly efficient when compared with projects of similar magnitude, with only two full-time staff members and significantly smaller budget than its international counterparts. Designed as a virtual organisation, our incremental approach provides a level of agility and responsiveness which is hard to replicate when compared to large OER projects hosted within education institutions.

The OER Foundation has now established a solid foundation on which to build, consolidate and mature the development of sustainable OER ecosystems serving the formal education sector. Our organisational commitment to open philanthropy and radical transparency in all our planning and operations engenders a culture of trust for organisations contemplating engagement in the OER movement.



Activities and outputs

The report is structured according to activities and outputs under the three initiatives contained in the grant proposal.

Improve OER content interoperability pedagogical reusability between the Connexions and WikiEducator/MediaWiki platforms

The OER Foundation recruited Jim Tittsler² to join the OER Foundation as Lead Software Engineer during October 2009, a few months after the inception date of the project. Jim has over 30 years experience in computer hardware and software design, with extensive experience in open source software development most notably making disparate data available across a variety of technology boundaries and is therefore ideally suited to providing technical leadership associated with the challenges of OER remix among multiple delivery technologies.

The first major technical assignment for the OER Foundation was to migrate our live international wiki project from the web-server administered by the Commonwealth of Learning. The replacement server configuration was to be hosted at Athabasca University, Canada. After setting up, configuring the servers and migrating the data to the Athabasca infrastructure, our tests on the pre-production version of the virtual server configuration recorded performance levels notably worse than the previous installation. We researched and implemented an alternate solution. The WikiEducator servers are now hosted in the cloud through a commercial provider. Regrettably these migration challenges resulted in unforeseen delays beyond our control in commencing the design and development work on OER content interoperability. Notwithstanding these delays, we managed a successful migration with a minimal disruption to our live service.

Work on building an interoperability tool between WikiEducator and Connexions has started slowly, with the first phase being consumed by planning and prototyping. The OER Foundation established a portal page on WikiEducator to encourage and support community dialogue and user input for the duration of the project³. Feedback from the community of educators using these technologies has been slow, partly due to the fact that the Connexions project does not have an active community discussion channel and educators are not well versed in open source software development approaches. However, a handful of users that are already active in both communities have been polled and input sought from potential users.

We built a prototype tool that pulls content from Connexions and formats it as wikitext. We've also experimented with using OpenOffice as a user interface for both platforms, and we have a beta version of an open document text (odt) export tool on WikiEducator. This allows the author to select content and customize it enroute to the other platform, but seems to make it impossible to preserve markup "roundtrip" from one platform to the other and then back again. Moreover, this approach creates a pathway for offline editing and is particularly suitable for the developing world where internet connectivity is unreliable and expensive. The OER Foundation's commitment to open file formats widens accessibility and portability of content because educators have more flexibility in their software choices without the need to sacrifice user freedoms. Most recently we've begun experimenting with using a browser-based tool for inserting text into the wiki in a way that will be familiar to Moodle 2.0 users. In parallel to these efforts, the WikiEducator community has been discussing ways to make the metadata surrounding each of our articles more useful and robust, with the thought of interoperability with other platforms always in mind. This is a high priority for the reusable and portable content project sponsored by the New Zealand Ministry of Education.

The challenges we've identified include:

- reconciling the differences in typical 'resource' lengths that suggest a single resource in Connexions results in a collection of articles in WikiEducator (This raises many questions

² <http://nz.linkedin.com/in/jimtittsler>

³ <http://wikieducator.org/CNX-WE>

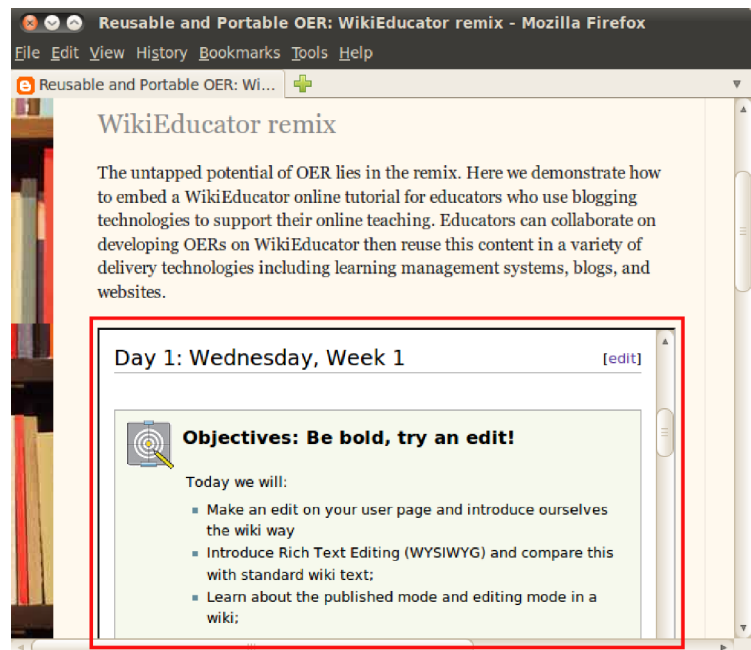
about preserving metadata and tracking contributions, and complicates the registration of embedded media elements.)

- tension between providing formats that are natural and concise in each platform's native markup yet preserve enough information that the history and differences in a resource edited in both remain meaningful
- differences in metadata collection, presentation, and authorship credits
- resolving conflicts in parallel development of resources in each platform
- need for a clear, familiar user interface that puts the author in control of these challenges and perhaps allows editing/customization during the process (And the limited development resources require that this be done by effectively reusing as much existing software as possible.)

The immediate plan is to continue exploring an AJAX interface to MediaWiki that will allow an author to pull data from remote sources including Connexions. We also plan to install a local instance of Enterprise Rhaptos (the Connexions software platform) so that we have a complete test environment available to permit experimenting with data flows in the other direction without inconveniencing the Connexions community.

Our work on building a national OER commons for New Zealand schools stressed the need to improve usability of the wiki interface for new users and the OER Foundation has successfully implemented a rich editor (i.e. WYSIWYG - What you see is what you get) alternative to standard wiki text. This has significantly lowered the barriers for new users to the wiki environment.

As the WikiEducator community grows, the demands for reuse and remix options for alternative delivery platforms has increased. This is a healthy sign suggesting that educators want to integrate OER into their mainstream teaching technologies. Specifically, New Zealand teachers requested options for integrating WikiEducator content into their local learning management systems. We have developed a simple but effective feature to integrate content from WikiEducator into the Moodle Learning Management System⁴. The same feature can be used to integrate WikiEducator content into any web site supporting the HTML iframe tag, as demonstrated in this blog reuse example⁵. This is an unforeseen but valuable addition to the OER remix landscape extending content interoperability beyond the Connexions platform.



Screenshot of a blog reuse example showing live WikiEducator content embedded in a blog post

⁴ <http://moodle.wikieducator.org/course/view.php?id=37>

⁵ <http://reusableoer.blogspot.com/2010/08/wikieducator-remix.html>

Build OER capacity through Learning4Content (L4C) training workshops

The Learning4Content (L4C) initiative has demonstrated a powerful yet cost-effective model to scale-up capability development on an international scale. L4C is the world's largest attempt to build wiki-skills for OER development in the formal education sector now totalling 4,676 registered participants since the inception of the L4C project in January 2008.

We have reduced the number of workshops, largely discontinuing the more expensive face-to-face alternatives⁶. Notwithstanding the reduction in the number of workshops, we have succeeded in increasing relative outputs. We have increased the average number of trainees per workshop compared with the previous reporting period without corresponding increases in the cost of provision or reduction in the absolute output of successful completions. The average number of registered participants has improved considerably from 34.89 to 76.19 per workshop representing an increase of 118% compared with the previous reporting period.



The downside of the online model is a noticeable reduction in percentage of participants who gain a certification during the workshop. In the previous reporting period (with the inclusion of face-to-face workshops in the delivery model) the certification rate was 45% of all registered participants. With the online-only model, this certification rate has dropped to 25.4% of registered participants. However, the significant increase in the average number of participants per workshop produces a higher number of certified participants, that is, an average of 19.0 per workshop (compared with 15.7 per workshop under the previous model.) This represents an increase of 21% in the total number of participants per workshop achieving a wiki certification. In summary, the online model significantly reduces cost and increases the output of certified WikiEducators.

During the period from 1 July 2009 to 31 July 2010, the OER Foundation scheduled 22 workshops (19 online workshops and 3 face-to-face workshops) registering 1,675 participants thus exceeding the total target of 1,150 participants at the midway point of the project. During this time we have also increased the number of “qualified” facilitators for conducting L4C workshops.

The introduction of a rich editor in WikiEducator necessitated the redevelopment of 8 online wiki tutorials for WYSIWYG editing. WikiEducator now supports training materials for both rich editing and standard wiki text editing. Based on our experiences from the preceding 18 months of the L4C project, we have also reconfigured and improved the workshop format, sequencing of lessons and the course schedule. We have also added value by developing a series of short video vignettes and more detailed screencasts to support our asynchronous training. We have now migrated all our online L4C workshops to be taught using rich editing with the option for educators to learn standard wiki syntax through independent self-study.

Establishing a national OER collaboration for the New Zealand school sector

The primary objective of the “OERNZ” project is to build a national collaboration for developing an OER commons for the school sector in New Zealand. While operating under the auspices of the Commonwealth of Learning, WikiEducator's work was predominantly focused in the postsecondary sector, with 50% of registered WikiEducator users coming from the tertiary sector. During the period of review, we have succeed in increasing the ratio of users from the school sector.

⁶ The OER Foundation supported only 3 face-to-face workshops during the period of review.

The OER Foundation was also successful in augmenting the Hewlett grant by securing a project to work with the Ministry of Education under their Managed Learning Environment initiative focusing on reusable and portable content for New Zealand schools. The OERNZ project is a valuable opportunity to expand the experience of the OER Foundation in the school sector leveraging the advantages of shared infrastructure.

The [reusable and portable content project](#), sponsored by the Ministry of Education is well-aligned with the Hewlett grant activity and focuses on three streams:

1. Capability and community development
2. Software and tools development to improve the usability of the technology for newcomers to collaborative online authoring and content integration with the technology platforms used by New Zealand schools.
3. Seeding OER content development for use in New Zealand schools.

This is an excellent example of the symbiotic relationships now possible with open source and open content projects. Software tools, and enhancements funded by the Ministry of Education are released openly for the benefit of the international WikiEducator OER community. The New Zealand Ministry of Education benefits from the critical mass and support of the OER Foundation's WikiEducator project and activities funded under this Hewlett Foundation grant. All project resources are released under a free content license enabling the work we are doing in New Zealand to be replicated in other countries. Already, Uganda has commenced work replicating strategies we are using in New Zealand⁷.

The collaboration with the New Zealand Ministry of Education has resulted in the OER Foundation achieving our output targets for external funding specified in the Hewlett grant proposal. Nonetheless, the scope and scale of this activity should be read in conjunction with the relatively small level of funding support from the New Zealand Ministry of Education when compared with multimillion dollar initiatives like Wikiwijs sponsored by the Dutch Ministry of Education. The total value of this Ministry project is US\$147,659 with only US\$85,248 earmarked for OER Foundation related activities. However, restricted funding fuels innovation and in the words of the New Zealand born Nobel Laureate, Ernst Rutherford: “*We don't have the money, so we have to think*”.

OERNZ has adopted a capability maturity model. The strategy aims to start planning the co-design of a national OER initiative in collaboration with the sector, ultimately shifting to a project owned and driven by New Zealand's teachers. During the initial phases the Ministry of Education and OER Foundation support the sector in building capacity and an inventory of OER examples as the foundations for achieving an engaged national community of teachers. Ultimately, we plan to build a sustainable and active community of teachers empowered to transform learning in the classroom using digital OERs and shared experiences. The OERNZ project has established a portal page on WikiEducator and a corresponding discussion list for the project⁸. We have convened a planning group comprising volunteer teachers from the sector. Planning meetings and discussions are conducted transparently in the wiki and our OERNZ community list.

OERNZ NEWS | By Kiwi teachers for Kiwi teachers
ISSUE 2, February 2010

We need your help!
Want to get involved? Become a WikiEducator and join the 18 teachers who have already signed up! We're looking to support at least one WikiEducator at 150 schools by 30 June. This person will be our point of contact for distributing newsletters and motivating local staff. They'll also promote the OERNZ concept of a community of educators and a platform for free educational resources, collaborative development and national network building. If you have a passion to widen access to quality education through open networks and free content, get in touch.
For more information:
<http://wikieducator.org/OERNZ/notes>
Or to register your interest:
http://wikieducator.org/OERNZ/join_amb

Building capability for the future
OERNZ took a significant step forward in December when 10 Kiwi educators got together at Christ's College in Christchurch. This pioneering group were the first people to participate in our 'Train the Trainers' workshops (<http://tinyurl.com/trainersworkshop>). The aim of these workshops is to establish a cadre of OERNZ WikiFacilitators or Trainers that can build the capability of New Zealand teachers for reusable and portable content.
"We explored a few of MediaWiki's advanced template features, but more importantly we brainstormed ideas and plans for building capacity for OER development in New Zealand," said project founder Dr Wayne Mackintosh. "It's great to see us living out our motto: 'For Kiwi Teachers, by Kiwi Teachers.'"
WHAT THE TRAINERS HAD TO SAY:
"It was good to network with other users and share ideas. The training was a mixture of show and tell, and hands on. I learnt a few new things about Wiki syntax. The new editor will be a huge bonus to the community and will help to get more people involved."
Jacqui Land, Papanui High School
"These are awesome tools that potentially save teachers having to use several different packages to do the same job. The sooner we can get them into the hands of enthusiastic teachers the better. I plan to develop my own set of resources for my courses over the next year, as well as run a few WikiEducator trainer sessions around Auckland."
Rob McCrae, Diocesan School
"I have been interested in WikiEducator for some time. I enjoyed working alongside others who are at various stages with their development. It was inspiring to see what might be done already with the small group of people there."
Vicky Smith, Westview

SIGN UP FOR A WIKI-TASTER SESSION
The first job of our new trainers will be running Wiki-Taster sessions for schools. These will be a short two-hour introduction to OERNZ, including basic skills to help teachers get started with collaborative OER development. We hope to reach 300 teachers by the end of June by running sessions across the country. If you'd like to know more or schedule a Wiki-taster session for your school, contact Wayne Mackintosh at the OER Foundation.
wayne@oerfoundation.org or visit <http://wikieducator.org/OERNZ/wikitaster>

What is OERNZ?
For all WikiEducator, OERNZ is an open project whose aim is to create an online community for teachers in New Zealand that will foster the collaborative development and sharing of digital resources in support of the national curriculum. These resources are thus freely available for anyone to use and, under license, will give you the opportunity to share, to alter, to improve and redistribute.

Go on, add to the Glossary
Looking for a definition? Albany Senior High School's Hanks Chalmers has set up 'English Language Techniques Glossary', a project that's seeking collaboration among teachers and secondary school students to develop a collaboratively-built glossary containing concise explanations of English language techniques and definitions. It's a work in progress and it's aiming to inspire people to write new entries or refine existing ones, as well as use it as a reference tool. So, go on, why not give it a go?
<http://wikieducator.org/LTGloss>

New word for your dictionary
While we're on the subject, how about: **Wikiing**, *vi.* to publish on a wiki!
You read it here first!

Now we are 11
A warm hi-tech and welcome to two new schools with OER portals:
Te Kaitiaki Christian School, Christchurch
Red Beach School, Whangaparaoa

<http://wikieducator.org/OERNZ>

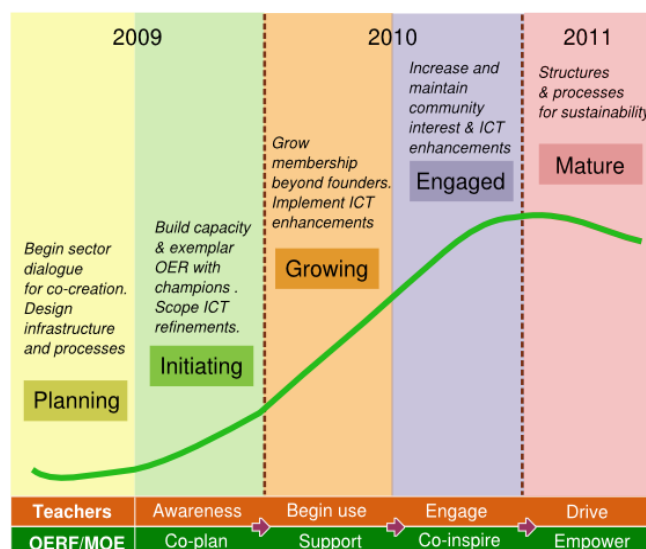
OERNZ News is published to nurture the development of an OER community for the New Zealand school sector

⁷ <http://wikieducator.org/OERUG>

⁸ <http://wikieducator.org/OERNZ>

We have conducted a number of dedicated Learning4Content workshops for New Zealand teachers. During the period of review we have offered four online workshops registering 69 participants. (These workshops are included in the total figures reported under the Learning4Content activity above.) Many New Zealand teachers prefer to participate in the international workshops and we encourage this to facilitate international collaboration.

The OERNZ project has also introduced a new training feature called a “Wiki-taster”⁹. This is a short 90 minute professional development opportunity to help teachers get started with collaborative OER development in



OER maturity planning curve for New Zealand school sector.

the wiki. Wiki-taster sessions are presented face-to-face at schools which request these sessions. Many Wiki-taster participants go on to register for one of the online Learning4Content workshops. We aim to scale-up Wiki-taster sessions across New Zealand. The OER Foundation hosted a train-the-trainer workshop for 11 teachers will now run these Wiki-taster sessions as requested from different schools. All the training resources for Wiki-taster sessions are released as OER¹⁰ thus generating opportunities to replicate the model in different countries.

Our data confirms that the vast majority of educators are not familiar or regular users of social software. Consider, for example, that 65% of new users report that they have not created a wiki account or cannot recall creating a wiki account prior to joining WikiEducator. In response to this challenge, we have introduced OERNZ News which is a short 2-page Newsletter and available for printing and distribution to teachers at schools. (An example of an OERNZ News issues is provided in Annexure A.) We have also introduced WikiAmbassadors for OERNZ. These are self-nominated individuals and are the first point of contact for OERNZ in local schools. They focus on connecting "disconnected" colleagues with our national online OERNZ activities and distribute the print-version of the OERNZ News to colleagues and friends who may not be connected.

The OERNZ project aims to commission the development of OER teaching materials and exemplars. The planning team successfully developed the selection criteria as well as guidelines for determining the nature and scope for commissioned OER development collaboratively¹¹. OERNZ has invited expressions of interest and advertised this widely through OERNZ News and all our community lists. However, uptake has been disappointing and it is unlikely that this approach will achieve the specified targets for commissioned OER exemplars where the OER Foundation pays teachers to develop OER for use in the classroom. Many New Zealand teachers are reluctant to accept payment for developing OER materials, which is a testament to their vocation of education. Anecdotal evidence would suggest that work demands and the community maturation regarding open content approaches have contributed to lower than anticipated uptake. We propose to reallocate a portion of the funding intended for paid OER development to conducting research into identifying and quantifying the barriers to participation in OER activities within the New Zealand school sector.

The issues associated with default copyright provisions of the New Zealand Copyright Act 1994 may be a barrier to participation. In the case of commissioned OER resources, an open copyright license is specified as a requirement in the contract and therefore not a constraint. However, in the case of voluntary open content development the copyright of teaching materials developed by teachers belongs to the Board of Trustees of the individual schools, and defaults to all rights reserved. The

⁹ http://wikieducator.org/OERNZ/OERNZ_Training/Request_a_Wiki-taster_session

¹⁰ http://wikieducator.org/OERNZ/wikitaster/Wiki-taster_materials_%28For_participants%29

¹¹ <http://wikieducator.org/OERNZ/Resources/Bounties>

OERNZ project has launched the development of a draft “Creative Commons Licensing” policy and we are encouraging and supporting individual Board of Trustees of New Zealand schools to consider adopting Creative Commons licensing policies. This is a slow and complex process but we are happy to report that two New Zealand schools have now adopted open licensing policies for their schools. Hopefully these examples will encourage other schools to follow.

OER is still a burgeoning concept in the New Zealand school sector. Our progress is to a large extent facilitated by the open collaboration with supportive officials in the Ministry of Education who are dedicated to improving reuse of portable digital content among New Zealand schools. Moreover, the New Zealand policy framework is conducive to promoting OER approaches, most notably the recent approval by Cabinet of the New Zealand Government Open Access and Licensing (NZGOAL)¹² framework which aims to encourage state departments to release Crown Copyright under Creative Commons Licences. The OER Foundation is building important relationships with key agencies that will facilitate progress of OER in New Zealand as illustrated by the recent invitation from Creative Commons Aotearoa New Zealand (operating under the auspices of the Council for Humanities), to serve on the inaugural Advisory Panel of Creative Commons New Zealand. These networks are a precondition for nurturing the development of sustainable OER ecosystems. The New Zealand approach may provide valuable insights for international adoption of OER in the school sector.

Progress towards intermediate and ultimate outcomes

Build OER content interoperability and improve pedagogical reusability between the Connexions and WikiEducator/MediaWiki platforms

Intermediate and ultimate outcomes	Status
Improve remixing and reuse of OER content through content interoperability between Connexions, WikiEducator and MediaWiki OER installations.	<ul style="list-style-type: none"> Completed a prototype tool that pulls content from Connexions and formats it as wiki text. Established a Connexions-WikiEducator remix portal page Polled users of both technologies for input on requirements Ongoing research and prototyping prioritising exiting open source software tools.
Improve potential for pedagogical reuse in different contexts by defining educational elements (iDevices), for example embedding widgets for learning activities.	<ul style="list-style-type: none"> iDevices defined as per the functionality of the eLearning XHTML editor (eXe). Prototype interactive activity developed and demonstrated on WikiEducator.

Build OER capacity through Learning4Content (L4C) training workshops

Intermediate and ultimate outcomes	Status
Double the number of WikiEducator users by 31 July 2011 targeting 17,000 educators	<ul style="list-style-type: none"> On track to exceed projected targets. (15,559 registered users as on 31 July 2010).
Double the output of OER content production by 31 July 2011 targeting 120 OER book equivalents.	<ul style="list-style-type: none"> On track to achieve and partially exceed the target. Commenced on 31 July 2009 with 73.14 OER book equivalents aiming to achieve 96.57 at midpoint of the grant. Recorded 108,67 OER book equivalents as on 31 July 2010.

¹² <http://www.e.govt.nz/policy/nzgoal>

Expand the base of OER training materials on how to develop OER in collaborative authoring environments.	<ul style="list-style-type: none"> • 8 new tutorials developed for teaching wiki editing using the rich editor. • Substantive improvements to Learning4Content workshop materials including the addition of video vignettes and screencasts to support online training.
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Establish a national OER collaboration for the New Zealand school sector

Intermediate and ultimate outcomes	Status
Increase proportional representation of educators from the school sector to 35% of the total number of WikiEducator users.	<ul style="list-style-type: none"> • On track to achieving the target with proportional representation of educators from the school sector increasing from 30.1% to 33.8 % of the total number of WikiEducator users.
Support the New Zealand school sector in utilising WikiEducator as a national OER repository for reusable and portable content under the Managed Learning Environment (MLE) initiative of the Ministry of Education.	Ongoing <ul style="list-style-type: none"> • Dedicated New Zealand Learning4Content workshops operational and have introduced Wiki-taster professional development sessions. • Requirements for administering commissioned OER teaching materials completed and expression of interest widely advertised. Uptake is slow and may be ahead of community maturation for OER. National Copyright Act may be a barrier. OER Foundation will conduct research into the barriers of participation.
Establish a New Zealand community of teachers working collaboratively on OER and sharing of best practices.	Ongoing <ul style="list-style-type: none"> • Created OERNZ community portal on WikiEducator and community discussion lists. • OERNZ News publication established – 3 issues published.

Major changes impacting on the project

Migrating a large international wiki project from an international agency to a new foundation resulted in unforeseen delays to commence technical development work on OER interoperability.

The OER Foundation was formerly registered on 28th day of April 2009 under the New Zealand Companies Act of 1993 and the mutual agreement for migrating WikiEducator to the OER Foundation was confirmed and announced in the keynote address on 24 September 2008 at the Open Education conference in Logan, Utah¹³. The WikiEducator project was officially an initiative of the 2006-2009 three-year plan of Commonwealth of Learning concluding on 30 June 2009. The Commonwealth of Learning did not confirm its agreed financial contribution to the OER Foundation and support for the WikiEducator project until 1 July 2009. Consequently, preparations and plans to migrate the servers to Athabasca University could not commence until written confirmation from the Commonwealth of Learning was received. The technical infrastructure at Athabasca University for hosting the

¹³ http://wikieducator.org/WikiEducator:OER_Foundation/About/Community_communique

WikiEducator websites proved inadequate and could not have reasonably been anticipated prior to the migration of the test instance of the WikiEducator database. In consultation with Athabasca University combined with our prototype trials of hosting the WikiEducator servers in the cloud, we collectively decided that this would be the best solution taking reliability, scalability and the cost-effectiveness of hosting a large international wiki installation. In hindsight, the OER Foundation is impressed with the performance and benefits of hosting in the cloud, notwithstanding the delays and unfortunate duplication of effort in migrating the servers. As an open project, we will encourage contributing members of the OER Foundation to join our technical administration team in building an international community support model for the WikiEducator websites.

Judging from the slow uptake on the widely publicised expressions of interest to develop OER exemplars for the New Zealand school sector, it would appear that we have overestimated the incentive value of paying for OER content development in the New Zealand school sector. While a number of teachers have expressed a reluctance to receiving payment for developing OER exemplars we do not have conclusive evidence on the motivations, perceived or real barriers or effective incentives for OER development in the New Zealand school sector. It is also conceivable that concept of OER is still very new to many teachers and that our interventions may be ahead of the OER community maturation curve in New Zealand. We propose to continue the expression of interest for paid OER development, but will augment this with research work on the incentives and barriers associated with the development and adoption of OER in the sector.

The most significant challenge facing the OER Foundation is the lack of capacity to respond to the growing diversity of needs and expectations associated with a rapidly expanding international collaboration. As the membership recruitment drive progresses, capacity and funding will increase to respond to these needs. However, this requires careful management and communication of realistic expectations to the community as we move from individual engagement to organisational implementation.

Lessons learned

- *Crossing the chasm from primary OER advocates and enthusiasts to organisational implementation.* Notwithstanding the impressive gains of the global OER movement and burgeoning strategic interest in those forecasting technologies for the future and profiling OER as a significant technology to watch, the open content movement is far from achieving critical mass as a mainstream approach in the formal sector. During the initial phases of the OER movement it was appropriate to encourage a “thousand flowers to bloom” but now it is time to focus energies on mainstream organisational adoption and implementation. We believe that the best way to start crossing the chasm is is to:
 - Develop outreach models that address teachers and instructors directly in the workplace in realising tangible benefits from OER approaches. That is, present clear value or a credible pain-for-gain rational for teachers (see David Porter¹⁴) within real organisational contexts.
 - Work directly with teaching organisations in addressing **their** problems and achieving **their** objectives through selected OER models and approaches (a key strategy of the OER Foundation).
 - Focus on the OER value chain network from a systemic perspective. That is, identify gaps in the OER value chain from the conceptualisation of an OER idea, through to the design and development and finally dissemination and implementation of OER in the curriculum. There are still missing links in the value chain network, for example: the gaps between open access publishing and integration of published

14 <http://conviviality.ca/2010/08/nowhere-near-critical-mass/>

research into the teaching materials used by research-led teaching institutions; focusing on the benefits of OER for the long-tail economics associated with low enrolment courses demonstrating how institutions can diversify curriculum offerings cost-effectively for these “endangered” courses on the the books of institutions challenged with financial cutbacks by using open content models; and the potential linkages between formal recognition of prior learning and open course approaches.

- *Lack of meaningful collaboration among mainstream OER projects.* The OER movement is not succeeding in leveraging its greatest asset and point of difference, namely the openness of OER. There is a disappointing lack of collaboration among the mainstream OER projects resulting in unnecessary duplication of effort, particularly regarding administrative related resources needed by all OER projects, for example membership agreements, policy documentation, memoranda of understanding documents, organisational toolkits on getting started with OER etc. These resources should be released as OER and freely available for all to fuel growth of the movement. This raises the question of the optimal organisational design and structure for the OER movement at an international level in a digitally connected world. It would appear that the organisation models adopted by a number of the large open source projects (for example the Mozilla Foundation, Apache Foundation) could be redesigned and remodelled for the internationalisation of OER. A significant feature of these models relates to the autonomy of individual projects operating under these structures but succeeding in the elimination of redundancy of operational requirements of individual projects and sharing of core infrastructure. The OER Foundation has launched a concept project called CollabOERate¹⁵ which aims to become the OER equivalent of [research and development](#) (R & D) for new "product" design in open content and open education. CollabOERate is successful when it succeeds in growing the OER ecosystem in a sustainable way. The CollabOERate concept could become the OER counterpart of industry's co-opetition model where OER organisations and projects agree to collaborate so they can compete better.
- *Strategic planning for uncertain OER futures.* Collectively, the OER movement is not doing a good job of collaborative strategic planning. It is worthwhile to examine OER from the perspective of a disruptive technology¹⁶ that could potentially result in a new value proposition than what the traditional education market expects. The assumption of OER as a disruptive technology would suggest that the future is going to be different from the past. Therefore, forecasts and strategic planning derived from historical data is unlikely to be a useful planning methodology for OER futures. Scenario planning provides a powerful approach for strategic planning in the context of these uncertain futures and it may appropriate for the international OER movement to augment its planning to incorporate scenario planning and foresighting methodologies into its strategy development.

Dissemination and sharing of OER experiences

As the OER Foundation subscribes to open philanthropy, all our data and project work is openly and freely available for reuse and research work. The OER Foundation is planning to launch WikiResearcher in the near future which aims to use the open peer collaboration model to promote the the collective design, conduct and dissemination of research work. While OER is a prime focus of the OER Foundation, WikiResearcher will extend across all areas of academic and research interest.

Members of the OER Foundation are regularly invited to speak at conferences, contribute to guest blog posts, media interviews and assist with open education projects. A few examples include:

- *OER Foundation, leads a global education collaboration.* Featured article in the Weekend Magazine, Otago Daily Times, 5 December 2009.¹⁷
- *Getting OER Right: Open Education, Copyright and Open Business Models.* Wayne

¹⁵ <http://wikieducator.org/OERF:CollabOERate>

¹⁶ http://en.wikipedia.org/wiki/Disruptive_technology

¹⁷ <http://www.odt.co.nz/lifestyle/magazine/84632/making-connections>

Mackintosh, guest speaker. Opening the Curriculum Colloquium, Massey University, New Zealand. 9 October 2009.

- *New Zealand's national OER project*. Session presented at Ulearn 2009. New Zealand. October 2009.
- Open Education Resources at Otago. *Akoranga*. Issue 5, February 2010. Featured interview of Robin Day and Wayne Mackintosh, University of Otago¹⁸.
- Video interview of Robin Day and Wayne Mackintosh of the OER Foundation by the University of Otago, February 2010¹⁹.
- *Back to the Future of OER: International Reflections on Quality, Professional Development and Sustainable Education*. Wayne Mackintosh. Invited Keynote Speaker. 2010 NROC Network Member Meeting. Monterey, United States. March 2010.
- *WikiEducator's Wayne Mackintosh: Open Education and Policy*. Guest interview published by Creative Commons, June 2010²⁰.
- *Wikimedia Foundation Public Policy Initiative*. Wayne Mackintosh of the OER Foundation was invited to serve on the Advisory Group of this project to share experiences from our work in the formal sector in helping Wikipedia improve public policy articles through engagement with the university sector²¹. August 2010.
- *WikiEducator: Visualising Open Education Futures*. Keynote Address by Wayne Mackintosh. Virtual Global Conference for Blended and Distributed Education. Christ University, Bangalore, India. 19 August 2010.

18 <http://hedc.otago.ac.nz/hedc/resources/Akoranga/mainParagraphs/04/document/Akoranga%205.pdf>

19 http://wikieducator.org/Otago_Polytechnic/About

20 <http://creativecommons.org/weblog/entry/22470>

21 <http://blog.wikimedia.org/blog/2010/08/06/announcing-the-public-policy-initiative-advisory-board/>

PROGRAM CHART

Main Activities	Interim Targets	Progress
Develop use cases for interoperable OER content and pedagogical iDevices	<ul style="list-style-type: none"> 30 Sep 2009 	<ul style="list-style-type: none"> Polled users for input and feedback on use case scenarios. IDevice functionality of the eXe open source project will be used as a baseline for development of corresponding functionality in the Mediawiki and Connexions platform. Connexions-WikiEducator remix portal page established In the absence of detailed user feedback, we have deferred the development of use case scenarios.
Requirements specification	<ul style="list-style-type: none"> 31 Oct 2009 	<ul style="list-style-type: none"> Prototype tool that pulls content from Connexions and formats it as wiki text completed. Identified the technical challenges that need to be addressed for content interoperability between the platforms
Development, implementation and testing	<p>The following release dates are scheduled:</p> <ul style="list-style-type: none"> 30 Apr 2010 31 Oct 2010 30 Apr 2011 31 Jul 2011 (Stable release version) 	<ul style="list-style-type: none"> Ongoing prototyping and development using an incremental approach. Next step is to install an OERF hosted instance of Enterprise Rhaptos
Recruit participants, organise and present L4C workshops	<p><i>1 Aug 2009 - 31 July 2010</i></p> <ul style="list-style-type: none"> 420 international educators trained 130 New Zealand teachers trained 	<p><i>1 Aug 2009 - 31 July 2010</i></p> <ul style="list-style-type: none"> 22 workshops presented registering 1,675 participants 8 new tutorials for Rich Text editing completed and implemented.
Establish a national OER collaboration for the New Zealand school sector	<p><i>1 August to 31 July 2010</i></p> <ul style="list-style-type: none"> Example OER templates completed Pilot example lessons completed Criteria for selecting authors for demonstrator lessons completed. 75 demonstrator lessons selected & commissioned 	<ul style="list-style-type: none"> Templates for lesson plans competed Criteria for selection of demonstrator OERs completed Expression of interest for demonstrator OERs published Uptake is slow (approximately 10 proposals received to date.)
WikiEducator monitoring and evaluation	<p><i>30 Sept 2009</i></p> <ul style="list-style-type: none"> Refine monitoring and evaluation plan Establish baseline data, retrospective to 1 August 2009 <p><i>31 Oct 2009</i></p> <ul style="list-style-type: none"> Complete user survey instruments <p><i>31 January 2010</i></p> <ul style="list-style-type: none"> Data collection point 	<ul style="list-style-type: none"> Ongoing data capture of the new user survey. Development of additional user survey instruments delayed, will be combined with the OERNZ research on barriers to OER development. Delay in first independent evaluation report.

Main Activities	Interim Targets	Progress
	<p><i>28 Feb 2010</i></p> <ul style="list-style-type: none"> • Monitoring review and data validation • <i>31 July 2010</i> • Data collection point • <i>31 Aug 2010</i> • First independent evaluation report • <i>31 Jan 2011</i> • Data collection point • <i>28 Feb 2011</i> • Monitoring review and data validation • <i>31 July 2011</i> • Data collection point • <i>31 Aug 2011</i> • Final independent evaluation report 	

OERNZ NEWS | By Kiwi teachers for Kiwi teachers

ISSUE 3, August 2010

The more schools put in the more they'll get out

OERNZ is a rich resource that can only get better, believes Jacqui Land, Assistant Principal and Project Director for ICT PD at Papanui High School.

WHAT'S YOUR REACTION TO THE OPEN EDUCATION RESOURCE PORTAL FOR NEW ZEALAND SCHOOLS BEING SET UP?

I think it is wonderful. I have often wondered why many schools work in isolation and are all producing the same material on the same topics.

WHY SHOULD SCHOOLS GET INVOLVED?

Schools should get involved because it is a rich resource that can only get better. It does, however, rely on the community's involvement and input. The more schools put in the more they will get out, especially with the introduction of the New Curriculum, the Alignment and National Standards. Why not all work together to produce a rich array of resources that can benefit the whole community?

HOW ARE YOU USING WIKIEDUCATOR AND OERNZ?

As a school, we're at the very early stages of our use of WikiEducator and OERNZ. At present we're setting up our school Moodle site and are looking at how we can integrate that with WikiEducator. We're hoping to have a SSO solution that will allow teachers to access WikiEducator from within Moodle. Our plan will then be to use WikiEducator and Moodle together to produce schemes of work, resources and on-line text books.

HOW DID YOU FIND THE SET UP PROCESS?

The set up process was incredibly easy and straightforward. The training sessions and help that are available online are of an extremely high quality and really helpful. There is also a lot of support already available from within the community.

WHAT HAVE YOU LEARNED SO FAR?

That there are increasing numbers of teachers who are willing to share resources and ideas. And that the WikiEducator community is extremely open and welcoming.

WHAT'S BEEN THE REACTION FROM STAFF TO USING OERNZ?

We haven't rolled it out to everyone. We're going to do that in Term 3. Those that have used it like it and think it has potential.

HOW WOULD YOU LIKE TO SEE OERNZ DEVELOP?

It would be good to see it be integrated into Moodle, so that material can flow easily from one to the other. I think the two support each other well. The editor has been a fantastic addition; other things like this which make it easy for staff to use would be good to incorporate. The more barriers that are removed the bigger the uptake would be. It would also be good to see some templates made available for the different subjects, key competencies and values to help reduce work load.



JACQUI LAND
ASSISTANT PRINCIPAL AND
HEAD OF SCIENCE AT
PAPANUI HIGH SCHOOL



PAPANUI'S PORTAL PAGE
[HTTP://WIKIEDUCATOR.ORG/PAPANUI_HIGH_SCHOOL](http://wikieducator.org/papanui_high_school)

New function converts documents to wikitext

Using WikiEducator has gotten a lot easier with the launch of OOoConverter, an experimental document conversion service. The new function – which can be found in your toolbox on the left hand side of the screen – enables the conversion of MS Word, and Open Office documents into wiki text.

"This bit of magic and inspiration was developed by Piers Harding from Catalyst with funding support from the Ministry of Education," explained Dr Wayne Mackintosh. "Think of this service as a way to kick start your pages in WikiEducator. The conversion service does a good job of basic text formatting, simple tables and headings, although it will not upload images to the server but will include the syntax. It will save the page as a subpage of your user-page, which you can then move to where you want in the wiki. Plus, if you have enabled your email, WikiEducator will automatically let you know when your document's been converted."

<http://wikieducator.org/Special:OOoConverter>

Free online workshops a success

Thanks to everyone who participated in the third and fourth OERNZ Online Workshops. Your enthusiasm and dedication were fantastic – these were a great success! The free two-week training courses covered a range of the knowledge and skills required to use WikiEducator to author resources that other teachers can share. If you're interested in learning more about WikiEducator, we will be running more free workshops soon – watch this space for details!

<http://wikieducator.org/OERNZ/training>

38 NZ portals and rising

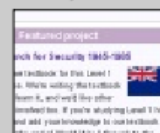
Welcome to all the schools and organisations that have recently started sites. There are now 38 portals on OERNZ. Isn't that great. Let's get collaborating! Among the new arrivals is the Southern Central Divide Cluster (SCD), a fantastic project between the Aorakinet, Cantatech and WestNet eLearning clusters. We hope that OERNZ can do its bit to help with collaborative, personalised learning across cluster schools

<http://wikieducator.org/SCD>

Project Tackles NZ history

Interested in New Zealand history? Check out 'New Zealand's Search For Security 1945-1985', a collaborative textbook for this Level 1 NCEA history course. It's been started by Albany Senior High School, who are "writing the textbook for this topic as we learn it, and we'd like other schools to become involved too. If you're studying Level 1 history, create an account and add your knowledge to our textbook. The topic takes us from the end of World War II through to the bombing of the Rainbow Warrior."

<http://wikieducator.org/History>



<http://wikieducator.org/OERNZ>

Seeding the creation of OER exemplars

Are you developing teaching materials we can share, adapt and modify for use in our classrooms as part of our national OERNZ project? Or do you know of anyone who is?

We're looking for reusable and portable content and to seed their development we're offering small payments to help us get started.

"I envisage this initiative as being a catalyst to get things started and for New Zealand's best educators to help seed our national repository," explained Dr Wayne Mackintosh. "Remember that we already provide free training for all New Zealand teachers in how to develop OER the wiki way to ensure that all educators have an equal chance in becoming part of our open education family. These honoraria could potentially compensate for a little release time to work on a shareable teaching resource, or to cover costs of authors from different schools to come together."

The OERNZ planning team have discussed and proposed guidelines for determining the scope of this project as well as listing ideas for the types of resources they would like to develop.

To find out more and to submit a proposal online go to:

<http://wikieducator.org/OERNZ/Resources/Bounties>

Getting a taste for OER

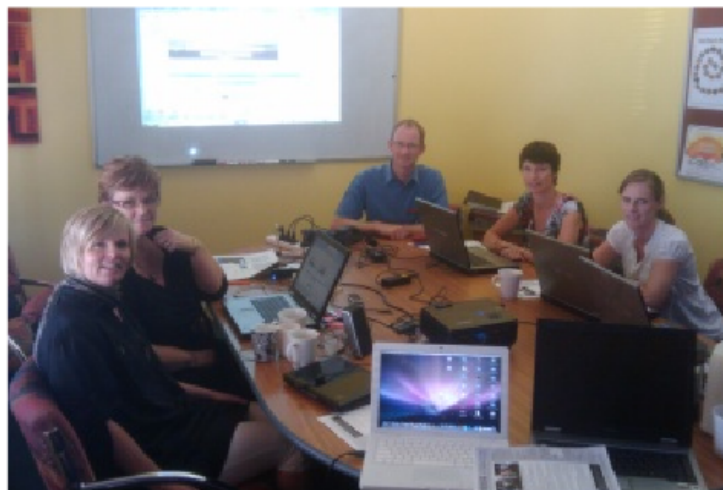
Red Beach School, Albany Senior High School and Normandale School recently held 'wikitaster' sessions to help staff build their 'wiki wizardry'.

"Both sessions covered essential wiki skills, such as how to edit a page, create new pages, work with multimedia and insert links," said facilitator Mark Osborne. "The most memorable part of both days was the number of ideas that teachers had about possible WikiEducator projects, particularly those that involve the students building the teaching and learning materials themselves."

"Projects born out of the wiktaster sessions include student-created drama tutorials, multimedia classics workbooks, mathematics tutorials and a student-built recipe book, complete with instructional videos. Wiki wicipes anyone?"

For more on Wiktaster sessions:

<http://wikieducator.org/OERNZ/wiktaster>



PARTICIPANTS IN THE FIRST OERNZ WIKITASTER SESSION AT RED BEACH SCHOOL.

What is OERNZ?

Part of WikiEducator, OERNZ is an open project whose aim is to create an online community for teachers in New Zealand that will foster the collaborative development and sharing of digital resources in support of the national curriculum. These resources are then freely available for anyone to use and, under licences which give you the permission, to alter, improve and redistribute.

Sharing Kiwi experiences with the OER world

Recently, OERNZ was invited to join a panel discussion at Yale University to share our experiences with leading OER practitioners with the view to assisting cross-national collaboration in open education.

"It's humbling to know that our work here in New Zealand can contribute to helping other countries with open education," said Dr Wayne Mackintosh. "Well done everyone! It was great to learn about experiences of the Dutch Ministry of Education, Brazil, OERUK, OER Africa and OECD, and bring this back home to New Zealand to take our work to the next level."

The session was part of The William and Flora Hewlett Foundation's 2010 Open Educational Resources Grantees Meeting.

http://cmi2.yale.edu/hewlett_conference_2010/

We are not alone

The Dutch Minister of Education, Ronald Plasterk, recently launched Wikiwijs, a national OER wiki commons similar to OERNZ. In the coming months, we'll be exploring ways in which New Zealand and The Netherlands may be able to collaborate.

<http://wikiwijs.inhetonderwijs.nl/english/>

WANTED: WikiAmbassadors

We're still looking for people to become WikiAmbassadors and be our point of contact at 150 schools across the country. You'll be responsible for distributing newsletters and motivating local staff, as well as promoting the OERNZ concept of a community of educators and a platform for free educational resources, collaborative development and national network building.

For more information:

<http://wikieducator.org/OERNZ/Roles>

Or to register your interest:

<http://wikieducator.org/OERNZ/WikiAmbassador>

Past issues of OERNZ News

Don't worry if you missed out on the first two issues of OERNZ News, you can download copies on our resources page.

<http://www.wikieducator.org/OERNZ/Resources>

Got a question?

We're developing a Frequently Asked Questions (FAQ) section on OERNZ. So, if you're looking for answers or have any question, go to:

<http://wikieducator.org/OERNZ/FAQs>

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So, please share and print this newsletter and its contents. The more teachers who know about and use OERNZ, the better it will become.

<http://nz.wikieducator.org>